Agenda

New Tools & Technology

Overview of RPA
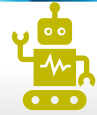
An Automation Journey

RPA Automations In Action

Q&A

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

New Tools & Technology

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023
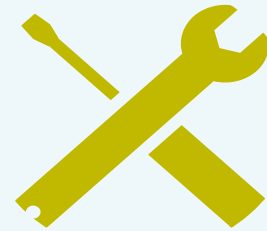
What's New in the Tech World:

Generative AI

- ChatGPT
- Bing Chatbot
- Microsoft Copilot

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023
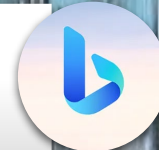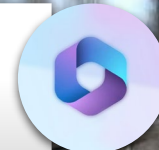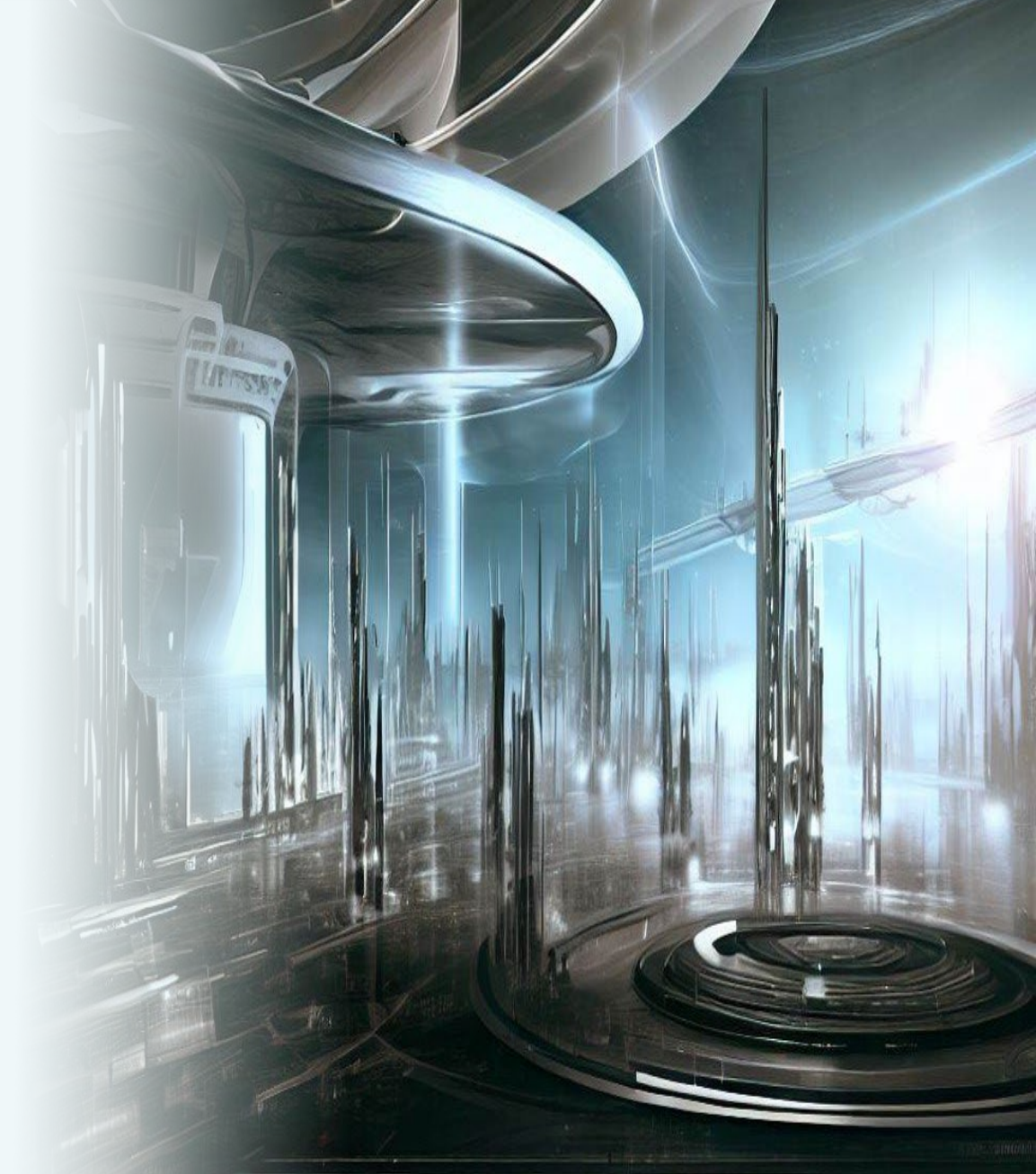
Let's look at ChatGPT

1. ChatGPT: Advanced conversational AI developed by OpenAI.

2. Uses deep learning and natural language processing to generate human-like responses.

3.   Trained on diverse internet text for informative and creative conversations.

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

ChatGPT the next Disrupters

"AI-powered chatbots like this will make human interaction obsolete."

"ChatGPT is just a sophisticated parrot, lacking true understanding and empathy."

"I worry about the ethical implications of AI models like this being used to deceive or manipulate people."

#FGFOA2023

Prior Disrupters

Email – 1980's –

"Email is impersonal and lacks the personal touch of traditional letters or phone calls."
"It will lead to information overload and reduce productivity."
"Email is not secure, and sensitive information could easily be intercepted."

WWW- 1991- World Wide Web-

"The web is just a fad, it won't replace traditional sources of information."
"It's too complicated for the average person to use effectively."
"The web will make us more disconnected from the real world and each other."

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Let look at this in action:

https://chat.openai.com/

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

What is Microsoft copilot

- It combines large language models with your data to enhance productivity.

- Copilot is integrated into Microsoft 365 apps to unleash creativity and unlock productivity.

- Copilot also has a new experience called BingChat

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Microsoft AI Chat Products

- **Bing AI-powered Search**
  - Follow up questions/prompts
  - Have chatbot summarize and cite the results into conversational answers
  - Ask the chatbot to reformat the answer in a specific way for your usage

- **Bing AI-powered Image Creator**
  - Search, chat, and create images in the chat box

- **AI-Powered Copilot for Microsoft 365 apps and services**
  - Embedded in-app chatbot assistant
  - Generate office files or content for files
  - Ask the chatbot to engage program features for you like Pivot Tables in Excel *(In case you hate using Pivot Tables yourself)*
  - Remember Clippy? Like that but better! (*If you miss Clippy, it is being resurrected as an emoji for Office 365 products*)

An Exploration of New Frontiers in Intelligent Technologies **#FGFOA2023**

Microsoft AI Chat

Microsoft AI Chat Creative

Powered by DALL-E

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023
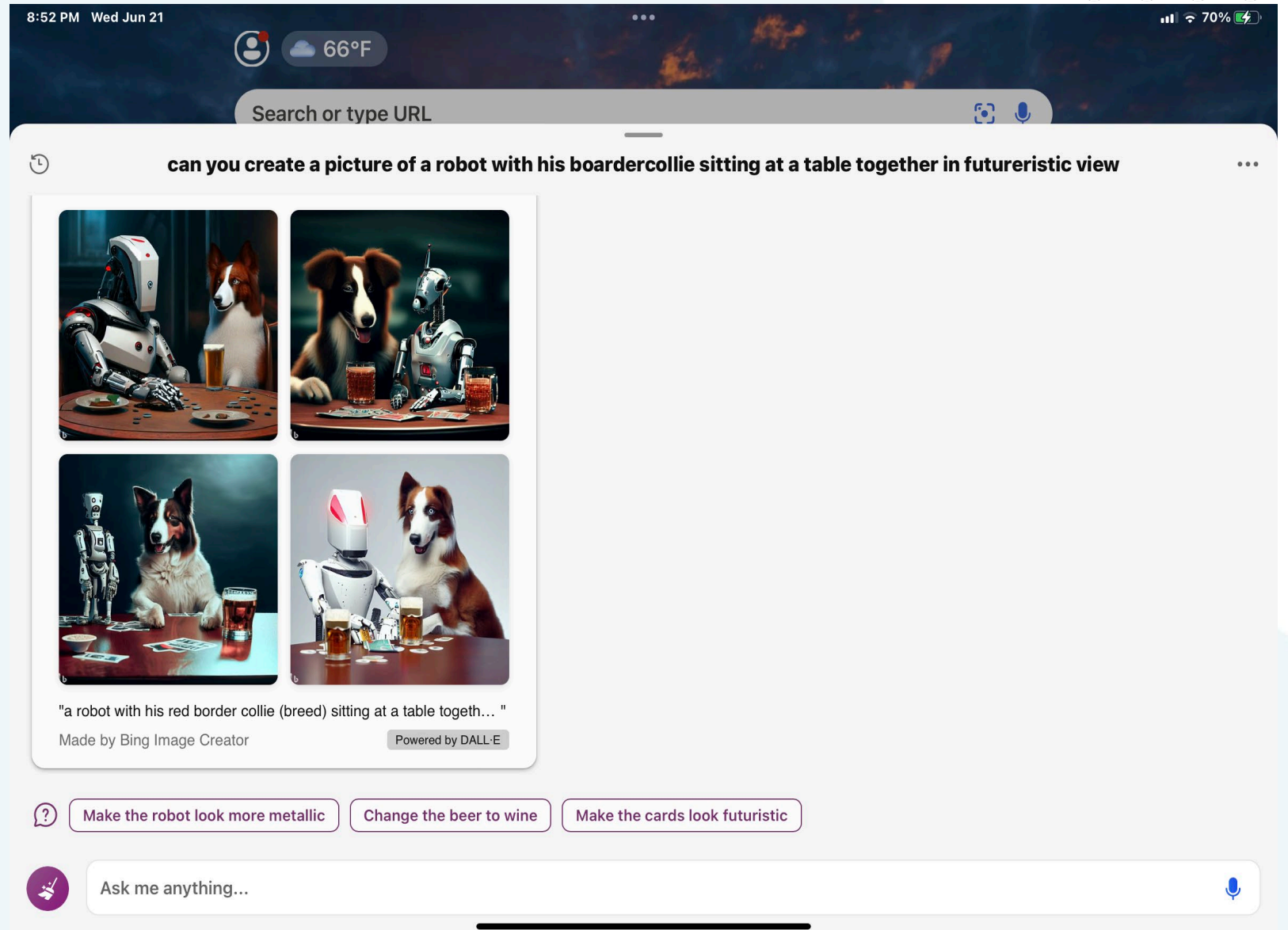
New Developments in Automation

- **Cognitive automation** combines AI and Automation Software to…

  - Improve how automation can capture data

  - Automate decision-making

  - Scale automation

An Exploration of New Frontiers in Intelligent Technologies **#FGFOA2023**

Different Tools in Your Tool Belt

Robotic Process Automation (RPA)

Machine learning & AI

Document understanding

Generative pre-trained transformer (GPT)
(like ChatGPT & DALL-E)

Microsoft Power Suite
(like Power BI & Power Automate)

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Overview of RPA

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Let's Look Deeper into RPA

__R__obotic __P__rocess __A__utomation

- **RPA is:**
  - Computer-coded software that can automate tasks that are:
    - Repetitive
    - Rules-based
    - Structured tasks

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

RPA Designed to…

- Work with existing systems and applications

- Log in to websites and software

- Scrape data

- Update spreadsheets

- Enter data

- Work with digital data

#FGFOA2023

Dispelling Myths about RPA

RPA IS...

- **</>** Computer-coded software
- **Ω** Programs that significantly reduce manual effort, when performing repetitive rules-based tasks
- Cross-functional and cross-application macros

RPA IS NOT...

- Walking, talking auto-bots
- Physically existing machines processing paper
- Artificial intelligence or voice recognition and reply software

WHAT RPA CAN DO

- Open email and attachments
- Log into web/enterprise applications
- Read and write to databases
- Move files and folders
- Copy and paste

- Scrape data from the web
- Extract structured data from documents
- Follow "if/then" decisions/rules
- Collect social media statistics
- Connect to system APIs

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Automation Opportunities

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

How to start your Automation Journey

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Problems Identified

- Manual entry, repetition, errors
- Staff shortage
- Late filing fees
- Time-consuming tasks
- Unsure how RPA functions

"We know RPA can help, but we don't know where to start."

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

It's a Journey!

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

What Processes First?

- Identified several processes

- Automate small process first

- Stable process is important

- Availability of SME

- Simple automation process

  - Without document understanding

  - Without Machine Learning

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Challenges Faced:

- Starting point undetermined

- Process not fully digital

- Process not stable

- Process to be modernized first

- Understanding of cost

- IT requirements undetermined

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

RPA Automation In-Action

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

First Automation:
Monthly Sales Tax Reporting

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Second Automation:
Daily Cash Reconciliation

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

"Our automation journey has been successful in reducing manual efforts, increasing efficiency, and minimizing errors.

These are critical steps toward achieving operational excellence.

We encourage all organizations to embark on their automation journey and reap the benefits of automation."

Charles Lino, City Manager
Town of Pecos City, TX

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Questions for Gail?

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023

Gail Gray, CPA
Technology Partner at LSL CPAs
Lance, Soll & Lunghard, LLP

www.lslcpas.com/RPA

Gail.Gray@lslcpas.com

An Exploration of New Frontiers in Intelligent Technologies

#FGFOA2023